

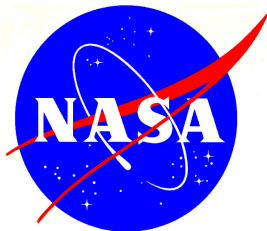


Integrated Financial Management Program

Core Financial

Course Name: Requisitions

Data Packet - MSFC



Space Administration

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TOPIC 1: Plan Acquisition

ACTIVITY 1a: Perform Market Research and Evaluate Acquisition Alternatives

In support of an ongoing project, the need for Vacuum Monitoring Systems was identified. As the Requisitioner, review any existing purchase orders/contracts available and identify possible acquisition methods for the order of vacuum distribution systems by material group. Display the selected purchase order and review it.

FIELD	DATA
Transaction Code	ME2L
Purchasing Organization	MSFC
<i>Searching for Vacuum Monitoring Systems</i>	
Material group	41

Note: See User Procedure, “Perform Market Research and Evaluate Acquisition Alternatives”

TOPIC 1: Plan Acquisition

ACTIVITY 1b: Perform Market Research and Evaluate Acquisition Alternatives

In support of an ongoing project, the need for flat panel HD televisions, DVD/VCR players, and installation were identified. As the Requisitioner, review procurement history by material group to determine potential sources of supply. Display the selected vendor and review it.

FIELD	DATA
Transaction Code	ZMM_PUR_AWARD
Purchasing organization	MSFC
<i>Searching for HD Televisions</i>	
Material Group	59
<i>Searching for DVD/VCR Players</i>	
Material Group	59
<i>Searching for Installation</i>	
Material Group	N

Note: See User Procedure, “Perform Market Research and Evaluate Acquisition Alternatives”

TOPIC 1: Plan Acquisition

ACTIVITY 2: Inquiry of Availability of Funds

As the Requisitioner, display both the Non Reimbursable and the Reimbursable funds and the dollar amounts associated with the funds to purchase Flat Panel HD Televisions, DVD/VCR Players, and installation service.

Non-Reimbursable Fund

FIELD	DATA
Transaction Code	ZNASANR
<i>Standard Selections</i>	
<i>Fund for Flat Panel HD Televisions</i>	
Fund	HSF542002D
Fund Center	62-ODIN
<i>Fund for Installation</i>	
Fund	HSF542002D
Fund Center	62-376-10
Year commitment item	2002
<i>Report Selections</i>	
FM Area	NASA
Fiscal Year	2002
Period	0
To Fiscal Year	2003
To Period	16

Reimbursable Fund

FIELD	DATA
Transaction Code (Reimbursable)	ZNASAR
<i>Standard Selections</i>	
<i>Fund for DVD/VCR Players</i>	
Fund	SAT292002R
Fund Center	62-251
Year commitment item	2002
<i>Report Selections</i>	
FM Area	NASA
Fiscal Year	2002
Period	0

To Fiscal Year	2003
To Period	16

Note: See User Procedure, "Inquiry of Availability of Funds"

TOPIC 2: Initiate Purchase Request

ACTIVITY 1a: Create/Maintain Purchase Requisitions

In support of an ongoing project, the need for Vacuum Monitoring Systems was identified and a purchase requisition needs to be created. As the Requisitioner, create a purchase requisition for the order of Vacuum Monitoring Systems and an option for installation. **(Note: Review Personal Settings)**

FIELD	DATA
Transaction Code	ME51N
Order type	NASA Qual Sensitive PR
<i>Header</i>	
Text tab	
Header Note	
Enter Suggested Vendor	Boeing
Enter Technical Representative & Phone:	J.J. Johnson; Tel: 999-9999
<i>Item Overview (Item 1)</i>	
Account Assignment	N
Item Category	Z
Material Group	41
Short Text	Vacuum Monitoring System
Quantity	10
Unit of Measure	EA
Del Date	TBD by Instructor
Requisitioner	TD15
Purchase Organization	MSFC
Plant	MSFC
Store Location	MSFC
Purchasing Group	MCA
<i>Item Details (Item 1)</i>	
Account Assignment tab	
ALI 1 -Percentage	50
ALI 1 - Cost Center	62UP40
ALI 1 - Order	FC400000
ALI 1 - Network	6000001
ALI 1 - Activity	10
ALI 1 - Fund	SAT292002D
ALI 2 – Percentage	50
ALI 2 - Cost Center	62UP40
ALI 2 - Order	FC300205
ALI 2 - Network	6000001
ALI 2 - Activity	20
ALI 2 - Fund	SAT292002D

Distribution	Distribution by Percentage
Text	
Item text	P/N: 4160-34NMMJK
Valuation tab	
Valuation Price (ea)	38,000.00
NASA Data tab	
Estimated Price (ea)	38,000.00
<i>Item Overview (Item 2)</i>	
Account Assignment	U
Item Category	D
Material Group	N
Short Text	Option 1 - Installation
Quantity	1
Unit of Measure	Job
Del Date	TBD by Instructor
Requisitioner	TD15
Purchase Organization	MSFC
Plant	MSFC
Store Location	MSFC
Purchasing Group	MCA
<i>Item Details (Item 2)</i>	
Text	
Item text	All supplies and services that are required to complete the installation will be provided by vendor.
Limits tab	
Overall Limit	.01
Expected Value	.01
NASA Data tab	
Estimated Price	300,000.00
<i>Enter Purchase Requisition Number</i>	

Note: See User Procedure, "Create/Maintain Purchase Requisition"

TOPIC 2: Initiate Purchase Requisition

ACTIVITY 1b: Create/Maintain Purchase Requisition

In support of an ongoing project, the need for Flat Panel HD televisions, DVD/VCR Players, and installation was identified and a purchase requisition needs to be prepared. As the Requisitioner, create a purchase requisition.

FIELD	DATA
Transaction Code	ME51N
Order type	NASA PR
Header	
Text tab	
Header Note	
Enter Suggested Vendor	Phillips Electronics
Enter Technical Representative & Phone:	J. Arther Pennington; Tel: 999-9999
Item Overview (Item 1)	
Account Assignment	K
Item Category	Z
Material Group	67A (Was changed to 67A from 59 due to a training database problem)
Short Text	5910MA Flat Panel HD television
Quantity	20
Unit of Measure	EA
Del Date	TBD by Instructor
Requisitioner	TD15
Purchase Organization	MSFC
Plant	MSFC
Store Location	MSFC
Purchasing Group	MCA
Item Details (Item 1)	
Account Assignment tab	
Cost Center	62ODIN
Order	FC400000
Fund	HSF542002D
Valuation tab	
Valuation Price (ea)	5000.00
NASA Data tab	
Estimated Price (ea)	5000.00
Item Overview (Item 2)	
Account Assignment	Y

Item Category	Z
Material Group	59
Short Text	5999RT-1 DVD/VCR Player
Quantity	20
Unit of Measure	EA
Del Date	TBD by Instructor
Requisitioner	TD15
Purchase Organization	MSFC
Plant	MSFC
Storage Location	MSFC
Purchasing Group	MCA
Item Details (Item 2)	
Account Assignment tab	
Cost Center	62CD30
Order	FC400000
Earmarked Funds	100000001
Valuation tab	
Valuation Price (ea)	350.00
NASA Data tab	
Estimated Price (ea)	350.00
Item Overview (Item 3)	
Account Assignment	P
Item Category	D
Material Group	N
Short Text	Installation
Del Date	TBD by Instructor
Requisitioner	TD15
Purchase Organization	MSFC
Plant	MSFC
Storage Location	MSFC
Purchasing Group	MCA
Item Details (Item 3)	
Account Assignment tab	
Cost Center	62MP31
Order	FC400000
WBS Element	62-376-10-15
Fund	HSF542002D
Limits tab	
Overall Limit	10,000.00
Expected Value	10,000.00
NASA Data tab	
Estimated Price	10,000.00
Enter Purchase Requisition Number	

Note: See User Procedure, “Create/Maintain Purchase Requisition”

TOPIC 2: Plan Acquisition

ACTIVITY 1c: Create/Maintain Purchase Requisition

There has been a change in price to an existing purchase requisition. As the Requisitioner, make the necessary changes to the purchase requisition for Vacuum Monitoring Systems and attach a statement of work for the installation option. Save the changes.

FIELD	DATA
Transaction Code	ME52N
<i>Enter Purchase Requisition Number (Topic 1 - Activity 1a)</i>	
Services for Object	SOW.rtf (attach to PR)
<i>Item Details (Item 1)</i>	
Valuation tab	
Valuation Price	46,000.00
NASA Data tab	
Estimated Price	46,000.00

Note: See User Procedure, “Create/Maintain Purchase Requisition”

TOPIC 2: Initiate Purchase Requisition

ACTIVITY 2: Cancel Purchase Requisition

A letter from NASA HQ was received stating the program in which the Vacuum Monitoring System was being purchased for was being eliminated due to shifts in funding priorities. As the Requisitioner, cancel all procurement line items on this purchase requisition. Save the changes.

FIELD	DATA
Transaction Code	ME52N
<i>Enter Purchase Requisition Number (Topic 1 - Activity 1a)</i>	

Note: See User Procedure, “Cancel Requisition”

TOPIC 2: Initiate Purchase Request

ACTIVITY 3: Obtain Approvals

As the Requisition Approver, review the workflow inbox to become familiar with it. The workflow approval process has been turned off for training. (Note: A series of screenshots have been incorporated into the Trainer's presentation that describes SAP workflow for purchase requisition approvals that includes the process for creating substitute approvers.)

FIELD	DATA
Transaction Code	SBWP

Note: See User Procedure, "Obtain Approvals (Purchase Requisition)"